Alberta Tourism Market Monitor

Canada's tourism industry poised for growth in 2016 and 2017...

According to a February 2016 Conference Board of Canada's Summer Travel Intentions Survey, more Canadians intend to take a summer vacation this year, compared to last year. More than 75 per cent of respondents indicated they plan to take a vacation between May and October this year, compared to 73.6 per cent in 2015. Survey results suggest that the share of Canadians planning to stay within Canada for their longest summer vacation was 41.6 per cent, an increase of 6.1 percentage points from 2015. Lower oil prices and a weaker Canadian dollar are the main contributing factors for these improved summer travel intentions.

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A Rendezvous Canada Survey revealed that Canada's travel and tourism industry is optimistic about continued growth in 2016 and 2017, based on strong performance in 2015. Destination Canada reports that international arrivals to Canada increased by 5 per cent in 2015, amounting to nearly $17 billion in total international tourism expenditures. Arrivals from Destination Canada's core markets increased by 7.9 per cent in the same year. The weaker Canadian dollar, increased tourism marketing funding for Destination Canada and the Federal Government's investment in Canada's 150th birthday celebrations in 2017 have all contributed to increased industry confidence.

... but outlook for Alberta not so rosy.

While the outlook for Canada's tourism industry seems bright into 2016 and 2017, the situation is quite different for Alberta. The Conference Board of Canada's survey reported that the summer travel intentions of Alberta respondents decreased by 5.3 percentage points in 2016, compared to last year. In addition, the economic downturn continues to impact the province negatively, with employment falling by 24,100 in May 2016 - the biggest monthly drop on record. Most of the jobs losses were full-time private sector positions.

Approximately 86% of total visitation to the province is made up of Albertans; therefore, decreased travel by Albertans within the province may offset expected gains from increased domestic visitation and international travellers (who contribute 9% and 5% respectively to total visitation in the province) in 2016 and 2017.

2015/16 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2016 (000's of arrivals and departures) [1]													
Edmonton International Total	602.7r	554.2r	578.3r	534.5p									2229.4p
Per cent change from 2015	-6.8%	-1.3%	-5.8%	-9.8%									-5.1%
Domestic	400p	397.9p	426.7p	399.5p									1624.2p
Per cent change from 2015	0.5%	4.5%	1.3%	-3.4%									0.6%
Transborder	97p	95.2p	95.5p	85.7p									373.3p
Per cent change from 2015	-18.0%	-20.5%	-26.1%	-28.2%									-23.2%
International	65.4p	61.1p	56.1p	49.3p									231.9p
Per cent change from 2015	-0.5%	0.2%	-11.2%	-17.8%									-7.2%
Calgary International Total	1205.9r	1193.5p	1304.2p										3703.5p
Per cent change from 2015	0.5%	3.8%	2.9%										2.4%
Domestic	810.9r	810.7p	892.5p										2514.1p
Per cent change from 2015	1.2%	5.9%	6.3%										4.5%
Transborder	236.3p	237p	263.2p										736.5p
Per cent change from 2015	-7.2%	-6.5%	-6.3%										-6.6%
International	158.6p	145.8p	148.6p										452.9p
Per cent change from 2015	10.3%	11.5%	1.4%										7.6%
Fort McMurray International Total	67.9p	71.0p	76.4p										215.4p
Per cent change from 2015	-30.3%	-21.9%	-21.5%										-24.6%
Highway Count 2016 (000's of vehicles) [2]													
Hwy 1 -Sask border w-bound	57.1	57.5	71										185.6
Per cent change from 2015	-1.0%	0.4%	9.7%										3.3%
Hwy 1 - Banff Pk Gate (2-way)	542.1	550.8	626.1										1719
Per cent change from 2015	8.0%	9.0%	15.0%										10.8%
Hwy 16 - Jasper Pk Gate (2 way)	90.1	89	118.8										297.9
Per cent change from 2015	-6.4%	-4.1%	6.4%										-1.0%
Hwy 16 - Blackfoot w-bound	143.9	139.2	160.3										443.4
Per cent change from 2015	-12.3%	-5.0%	-6.2%										-7.9%
National Park Attendance (000's of visitors) 2016 [3] Does not include Group Tours													
Banff	196.6p	212.2p	239.1p	**242.6p**	**300.5p**								**1,191.0p**
Per cent change from 2015	6.3%	12.5%	17.3%	**-1.7%**	**1.4%**								**6.3%**
Jasper	51.0p	55.2p	71.6p	**140.3p**	**180.3p**								**498.4p**
Per cent change from 2015	-3.4%	3.0%	11.7%	**-4.6%**	**1.2%**								**0.5%**
Waterton Lakes	8.5p	11.5p	13.1p	19.6p	**41.9p**								**94.6p**
Per cent change from 2015	26.9%	53.3%	40.9%	32.4%	**6.9%**								**22.1%**
Employment (000's of persons) 2016 Seasonally Adjusted [4]													
Accommodation and Food Services	138p	135.7p	138.6p	141.0p	**141.1p**								**138.9p**
Per cent change from 2015	-12.0%	-13.7%	-11.1%	-8.1%	**-10.0%**								**-9.7%**

Sources: Edmonton International Airport, Calgary International Airport, Fort McMurray International Airport, Alberta Transportation, Parks Canada, Statistics Canada.

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Accommodation Indices 2016 [3]													
Edmonton Occupancy Rate	49.7%	59.0%	61.0%	**60.7%**									**57.5%**
Point change from 2015	-5.0	-6.7	-6.2	**-7.3**									**-6.3**
Average Daily Room Rate	$128.02	$131.88	$131.91	**$130.77**									**$130.74**
Variance from 2015	-5.0%	-4.3%	-5.0%	**-4.9%**									**-4.8%**
Revenue per available room	$63.58	$77.83	$80.46	**$79.38**									**$75.21**
Calgary Occupancy Rate	45.8%	50.9%	53.5%	**56.4%**									**51.6%**
Point change from 2015	-9.4	-11.1	-10.2	**-8.3**									**-9.7**
Average Daily Room Rate	$138.84	$138.98	$137.57	**$142.24**									**$139.45**
Variance from 2015	-10.4%	-10.7%	-12.1%	**-8.6%**									**-10.4%**
Revenue per available room	$63.63	$70.69	$73.65	**$80.23**									**$72.01**
Alberta Resorts Occupancy Rate	42.5%	53.9%	55.4%	**46.8%**									**49.6%**
Point change from 2015	1.6	0.5	5.6	**-1.6**									**1.6**
Average Daily Room Rate	$184.26	$195.28	$195.40	**$180.42**									**$189.42**
Variance from 2015	0.9%	10.7%	14.3%	**5.8%**									**8.4%**
Revenue per available room	$78.40	$105.22	$108.31	**$84.36**									**$93.97**
Other Alberta* Occupancy Rate	35.3%	39.6%	40.4%	**39.2%**									**38.6%**
Point change from 2015	-17.1	-15.9	-12.7	**-9.8**									**-13.8**
Average Daily Room Rate	$122.20	$123.10	$120.47	**$116.27**									**$120.53**
Variance from 2015	-9.0%	-7.8%	-8.3%	**-10.4%**									**-8.9%**
Revenue per available room	$43.09	$48.69	$48.70	**$45.62**									**$46.56**
Total Alberta (excl. Resorts) Occupancy Rate	42.4%	48.3%	49.9%	**50.3%**									**47.7%**
Point change from 2015	-11.5	-12.1	-10.4	**-8.8**									**-10.7**
Average Daily Room Rate	$129.50	$131.06	$129.79	**$129.88**									**$130.07**
Variance from 2015	-8.0%	-7.5%	-8.5%	**-7.7%**									**-7.9%**
Revenue per available room	$54.94	$63.24	$64.82	**$65.35**									**$62.07**
Food Services and Drinking Places 2016 ($ Millions) unadjusted [6]													
Total Receipts for Alberta	**671.64r**	**663.95r**	**715.95p**										**683.85p**
Per cent change from 2015	**-2.6%**	**0.9%**	**-1.9%**										**-1.2%**
Historic Sites and Museums 2016 (000's of visitors) [7]													
Visitor Attendance	10.6p	26.4p	36.3p	**33.6p**	**66.6p**								**173.5p**
Per cent change from 2015	-6.2%	14.3%	4.0%	**-3.4%**	**6.4%**								**5.2%**
Exchange Rates 2016 [8]													
Canadian Dollar/U.S. Dollar (noon)	0.70	0.72	0.76	0.78	**0.77**								**0.75**
Canadian Dollar/ Euro	0.65	0.65	0.68	0.69	**0.68**								**0.67**
Canadian Dollar/ Great British Pounds	0.49	0.51	0.53	0.54	**0.53**								**0.52**
Oil Price: Western Texas Intermediate (WTI) 2016 [9]													
Cushing, OK Spot Price (US Dollar per Barrel)	31.68	**30.32**	**37.55**	**40.75**									**35.08**
Hotel Projects Valued $5 million or Greater 2016 ($ Millions) [10]													
Total Value of Hotel Projects Inventory	$899	$1,102	$1,177	**$799**									**$799**
Sources: CBRE Limited, Statistics Canada, Alberta Culture, Bank of Canada, WTI, Government of Alberta													

*Other Alberta includes Lethbridge, Red Deer, and other Alberta communities

**Please note that the Royal Alberta Museum closed on December 6, 2015. See Notes section for details.

Note: New monthly figures are shown in bold type. Revisions will be bolded.
r=revised p=preliminary

1. Air Passengers - Numbers are preliminary estimates of air passenger arrivals and departures at the Edmonton International and Calgary International Airports. From September 2015, total domestic passengers at Fort McMurray International Airport have been added.
Source: Edmonton International Airport, Calgary International Airport and Fort McMurray International Airport Websites.

2. Highway Traffic: These are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for all vehicles.
Source: Alberta Transportation's Automatic Traffic Recorders (ATR). http://www.transportation.alberta.ca/3459.htm

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.
Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data are included in the annual edition of the Market Monitor.
Source: Parks Canada.

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.
Source: Statistics Canada, Labour Force Survey.

5. Accommodation Indices for Major Regions - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Revenue per available room is calculated using the occupancy rate and average daily room rate.

Source: CBRE Hotels Trends in the Hotel Industry National Market Report, with reproduction and use of information subject to CBRE Disclaimer and Restrictions as detailed at www.cbre.ca

6. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.
Source: Statistics Canada, Food Services and Drinking Places.

7. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Tyrrell Museum of Paleontology and the Tyrrell Field Station. **The Royal Alberta Museum closed on December 6, 2015. Tyrrell Field Station was closed on weekends and holidays starting October 17th.

8. Exchange Rate- this is the average monthly exchange rate.
Source: Bank of Canada.

9. Western Texas Intermediate - This is the average monthly oil price.
Source: Cushing, OK WTI Spot Price FOB.

10. Major hotel projects in Alberta - This is the inventory of hotel projects in Alberta, including new hotels and renovations valued at $5 million or greater. It is not a complete list of hotel projects. The project stages included in the reported number are: announced, under construction and completed. If the project is completed, it will be removed from the inventory after 30 days from completion. More information on other tourism and recreation projects is available on the website provided below.
Source: Government of Alberta. http://majorprojects.alberta.ca/

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